California Technology Agency
TECHNOLOGY AGENCY
Office of Technology Services

California Technology Agency Billing System (CalTABS)

June 19, 2012

California Technology Agency Billing System

Demonstration and Overview

- Project Team
- Background
- Features
- Benefits
- What's Next
- CalTABS Demonstration

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Project Team

- **Melissa Matsuura, Executive Sponsor**
- **Steering Committee**
  - **Mike Deraya**
  - **Gary Grootveld**
  - **Bill Liu**
- **Lisa Silva, Project Director**
- **Bridget Arena, Project Manager**
- **Elizabeth Brownfield, Technical Manager**
- **Natividad Nevarez, Business Manager**
- **Ravikumar Jeenaraj, Technical Lead**
- **Cindy Maciel, Business Lead**

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Background

- **The Governor's Reorganization Plan (GRP) consolidated multiple State IT functions under the California Technology Agency. The consolidation of the billing systems is one of the planned strategic projects.**

- **The CalTABS is a solution that enables the customer's billing information to be stored in an integrated, single billing system with the capability to produce electronic invoice information in a secure format.**

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- **Background (Continued)**
- **Customer Focus Group established to:**
  - Inform customer community
  - Document customer requirements and specific needs
  - Document customer data files and data elements
  - Document required invoice and report requirements
  - Determine training needs

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Features

The CalTABS utilizes the IBM Tivoli Usage and Accounting Manager (TUAM).

- Collects resource usage data
- Assigns service codes to each service
- Delivers detailed information and reports about the use of resources
- Central repository for billing and usage data
- Provides easy reporting through a web portal
- Provides customers the ability to track and manage their IT costs

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Benefits

- **CalTABS is an enterprise billing solution that supports the billing for:**
    - California Technology Agency services
    - OTech services
    - New services
    - Public Safety Communication Office (PSCO) – implementation will be phased in at a later date

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Benefits (Continued)

- **Improve customer service**
    - Quicker availability of invoice data
    - Additional invoice detail
    - Ability to export reports to Excel format
    - No cost to view invoices via the web
    - Allows access to a broader range of users

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Benefits (Continued)

- **Secure electronic interface for external customers to receive monthly invoices and invoice detail information.**
  - Electronic invoices published by customer id
  - Ability to control levels of access to web reports and invoices for customers/users (password restricted)
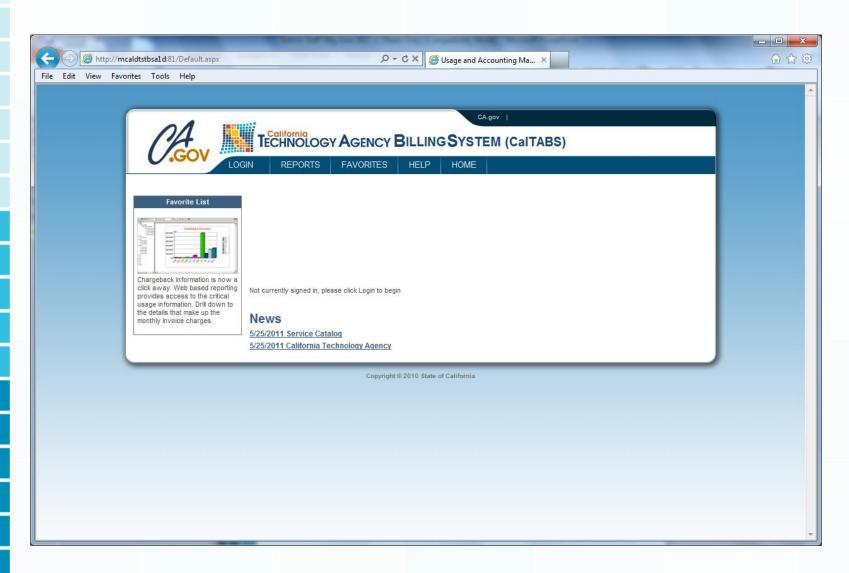 - Ability to view invoices and invoice detail reports via the web 24/7

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What's Next for CalTABS?

- Customer training (July/August)

- Phase I – Implementation

- Phase II - Enhancements

- Phase III – PSCO's billing interface

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- **Questions/Comments?**